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L4: Entry 1 of 1

File: USPT

May 23, 2000

DOCUMENT-IDENTIFIER: US 6067525 A

TITLE: Integrated computerized sales force automation system

Detailed Description Text (16):

The sales management component 112 supports the sales process by allowing sales managers access to current information from salespeople for which they have managing responsibilities. The sales management component 112 may be implemented using client-server technology to allow sales managers to electronically manage sales activities including coaching, planning and forecasting, even when sales personnel are away from the main office. As with the self management component 110, the sales management component 112 may be intelligently integrated to interact with each of the other components of the system. With such an implementation, key sales events are recognized by the system, and the sales management component 112 automatically implements management tasks on the basis of these events.

Detailed Description Text (87):

Through the event manager 201A, the subcomponent modules of the self management component 110 can be accessed as needed while using other components of the system. For example, the opportunity management module 704 can be accessed by the salesperson to assist in the time-consuming tasks of prioritizing opportunities, managing the sales process, communicating results, forecasting, reviewing progress, managing customer information and analyzing markets. As an integrated system, each of these task may be used as needed to effectively self manage the salesperson's time. Due to integration with the sales management component 112, the information can also be reviewed by the sales management team to help monitor the sales process and ensure that objectives are met.

Detailed Description Text (101):

FIG. 9 illustrates the sales management component 112B connected to the event manager 112B. As illustrated, the sales management component 112B is comprised of modules that are optimized for use with other modules of the sales system. Typically, a sales manager has responsibility for both management of sales personnel and direct sales accountability for certain clients. In this fashion, the sales manager component 112B is an integrated component of the sales manager's sales system. As described above, when the sales manager is located at the home office, the sales manager component 112B is located in the back office system. Alternatively, if the sales manager is mobile, the sales manager component will be located in the salesperson support system 100. The functionality, however, remains substantially the same. The sales manager module 902 of the sales manager component 112B is used by the sales manager to forecast, coach, plan performance, assign tasks, review territories, handle commissions, assign task capabilities, etc. The fully integrated system also provides a common platform between the sales personnel and the sales management personnel to enhance communication and reduce redundant or administrative activities. The system is integrated to permit the sales

Detailed Description Text (170):

FIG. 22 illustrates an alternative embodiment which incorporates an expert system 2002 which allows the system to learn successful sales approaches and automatically

implement such approaches in future sales process. For example, the expert sales system may be programmed to monitor the sales processes for desired (successful) sales events. These events may be include, for example, a customer purchase of a product, a repeat sale to a customer, a large number of leads being qualified to potential customer, and the like. These events represent successes in the sales process. When a successful event occurs, the system preferably identifies the events or actions leading to the desired outcome. The expert system may then dynamically alter the rules in the event manger database 1904 to automatically initiate (or set different values for) the identified events or actions in similar subsequent sales activity.

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L34: Entry 4 of 5

File: USPT

Dec 1, 1998

DOCUMENT-IDENTIFIER: US 5844971 A

TITLE: Form creating and ordering system

Brief Summary Text (5):

Managing and providing a variety of different forms for a large number of users can be very labor intensive. The forms provider keeps a number of hard copy versions of each of the forms on hand to satisfy requests by users. Since the forms may be printed off site, it is necessary to always maintain a substantial stock of forms in order to be able to respond to expected requests. If the lead time for printing the forms is say, one week, then the forms provider must keep on hand at least one week's supply of hard copies to provide to users. In addition, when one or more of the preprinted forms are changed by the forms provider, it is necessary to either discard the existing stock of old forms and build up a stock of the new forms or to wait until the existing stock of old forms is completely depleted before using the new forms. Discarding existing forms is wasteful and waiting to deplete old forms before replacing the old forms with new forms can cause undesirable delays in using the new forms. Furthermore, if the forms are kept in a single centralized location, then users that require forms must either go to that location to retrieve the forms or the forms provider must deliver the forms to the users.

Brief Summary Text (8):

While the telephone ordering system described above is more convenient for the users than having to pick up the forms at a centralized forms location, it requires that the forms provider maintain a telephone hotline having operators for speaking to the users or playing back recordings of the user's calls. In addition, since the operators only have access to forms that have been previously printed, it is necessary for the forms provider to replace the hard copy forms whenever the forms provider changes the forms. Also, the telephone ordering system does not address the lead time deficiencies associated with form changes, and does not address the problems associated with maintaining an inventory of hard copies of the forms or the disposition of this inventory when forms are changed.

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